



eMail TRAINING MANUAL

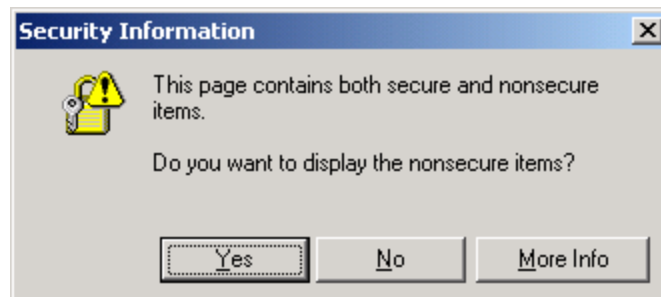
BASIC LEVEL

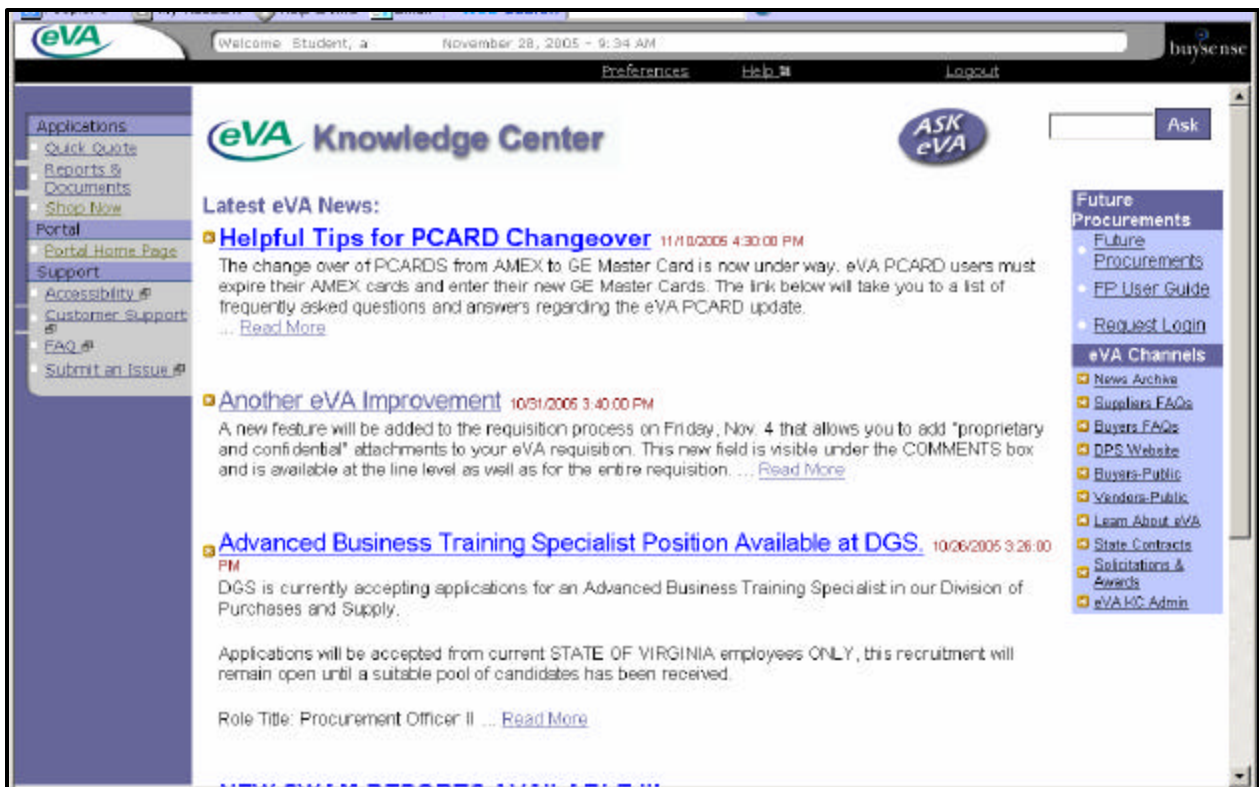
Ordering NON CATALOG items



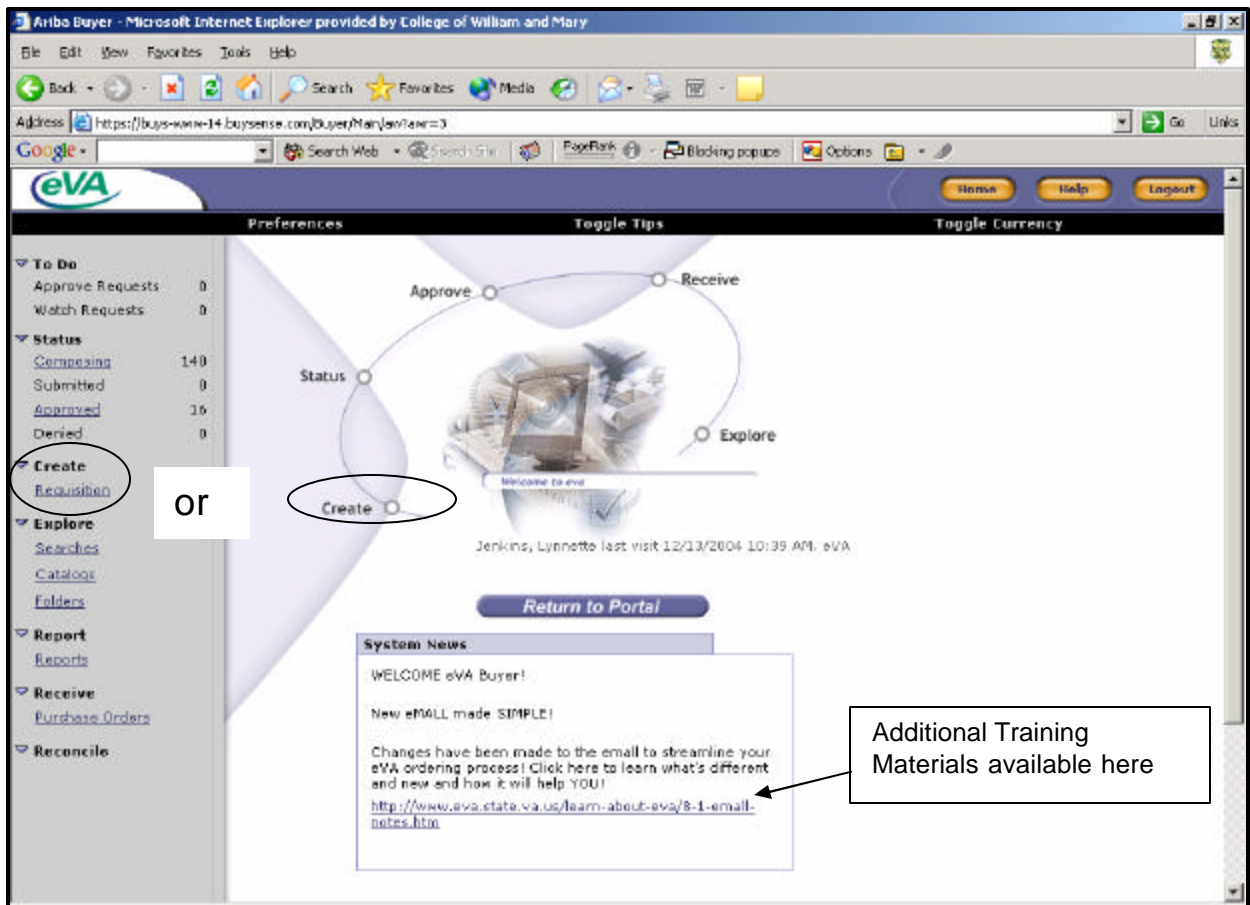
LOG IN

- Log in as a Buyer
- Username and password is case sensitive! Be sure to enter your username in all lowercase letters
- When the following dialog box appears, click YES to proceed:





Click on "Shop Now". Then click on "Requisition" or "Create".



CREATING A REQUISITION

The screenshot shows the eVA (Electronic Vendor Administration) interface for creating a requisition. The top navigation bar includes 'Home', 'Help', and 'Logout' buttons. Below this, there are tabs for 'Preferences', 'Toggle Tips', and 'Toggle Currency'. The main header area displays 'PR206306: Untitled Requisition' and 'Items: 0 Total: \$0.00000USD'. A 'Shopping Cart' sidebar on the left lists four steps: 1. Add Title (highlighted), 2. Add Items, 3. Add Accounting Details, and 4. Checkout. The main content area is titled '1 Add Title' and 'Requisition'. It contains several input fields: 'Title' (text box with 'OFFICE SUPPLIES - LAB C (Jeanette Jenkins)'), 'On Behalf Of' (dropdown menu with 'testp5, uat'), 'Use PCard' (checkbox checked), 'PCard number' (dropdown menu with 'utestp50011'), 'Entity Code' (text box with 'P104' and a '[select]' link), 'Fiscal Year' (text box with '2004' and a '[select]' link), 'agency' (text box with '(no value)' and a '[select]' link), 'PO Category' (text box with 'R01' and a '[select]' link), and 'Header Cross Reference' (empty text box). At the bottom right of the form, there are 'Next >' and 'Exit' buttons.

ADD TITLE

- Title: Type an identifying title of your choice.
- On Behalf Of: Will default.
- Use PCard: If visible, uncheck box if you will not be using purchase card.
- PCard alias: Will default, if applicable.

Remaining fields will default.

IMPORTANT: Change the PO CATEGORY to R02 when using a non-registered vendor or when the order is for a commodity type that appears on the eVA exclusion list.

Click "Next" button.

CREATING A REQUISITION (continued)

The screenshot displays the eVA (Electronic Vendor Administration) web application. The top navigation bar includes links for Home, Help, and Logout. Below this, there are tabs for Preferences, Toggle Tips, and Toggle Currency. The main header area shows the user's session information: PR206306: OFFICE SUPPLIES - LAB C (Jeanette Jenkins). The status bar indicates 'Items: 0' and 'Total: \$0.00000USD'. A sidebar on the left lists the steps: 1 Add Title, 2 Add Items (highlighted), 3 Add Accounting Details, and 4 Checkout. The main content area is titled 'Add Items' and features a search interface with fields for Keywords, Favorites, Contract Type, Contract Number, and Manufacturer. A 'Search' button and an 'Options' link are also present. A yellow button labeled 'Create Non-Catalog Item' is circled in red. Below the search fields, it states '1,000 items found' and 'View By: Category'. The results are displayed in two columns, listing various product categories such as 'PunchOut Catalogs', 'Cleaning Equipment and Supplies', 'Defense and Law Enforcement and Security and Safety Equipment and Supplies', 'Food Beverage and Tobacco Products', 'Laboratory and Measuring and Observing and Testing Equipment', 'Material Handling and Conditioning and Storage Machinery and their Accessories and Supplies', 'Mineral and Textile and Inedible Plant and Animal Materials', 'Apparel and Luggage and Personal Care Products', 'Communications and Computer Equipment and Peripherals and Components and Supplies', 'Domestic Appliances and Supplies and Consumer Electronic Products', 'Furniture and Furnishings', 'Management and Business Professionals and Administrative Services', 'Medical Equipment and Accessories and Supplies', and 'Musical Instruments and Recreational Equipment and Supplies'.

ADD ITEMS

The above screen appears, which is used for catalog ordering.
Refer to the eMail User Guide, Vol. 1 for catalog searching techniques.

- Click on the “Create Non-Catalog item” button

CREATING A REQUISITION (continued)

PR1068723: Office Furniture - Lab C
Items: 0 Total: \$0.00000USD

2 Add Non-Catalog Item Requisition

Full Description: Modular work desks

*Commodity Code: Office furniture, Desks (NIGP 42521, 42544)
(no value)

*Supplier: Office furniture, Desks (NIGP 42521, 42544)

*Contact: Exterior lighting and fixtures, kerosene or pro...
Printer and facsimile and photocopier supplies,...

Supplier Part Number: Paper products, Printing and writing paper ...

Contract #: Engraving, Engraved roll printing (NIGP 96628)
Other...

Supplier Auxiliary Part ID:

Quantity: 1

Unit of Measure: each

Price: \$0.00000USD

Amount: \$0.00000USD

Update Total

* indicates required field

OK Cancel

ADD NON CATALOG ITEM

- Full Description: Enter description of item being ordered using key words first.
- Commodity Code: The pull-down pick list (above) will store recently used codes. To search for other codes, click on "other" and the following screen appears:

Choose Value for Commodity Code

Field: Name desk Search

Page 1

Name	Action
Casgood and non modular systems, Casgood or non modular desk (NIGP 42521)	Select
Communication Software, Desktop communications software (NIGP 20827, 20945, 20844)	Select
Computers, Workstations or desktop computers (NIGP 20453, 20496, 20455)	Select
Desk organizers and accessories, Desk drawer organizers (NIGP 61533)	Select
Desk organizers and accessories, Desktop trays or organizers (NIGP 61533, 61555)	Select
Desk organizers and accessories, Message holders or dispensers (NIGP 61533)	Select
Desk supplies, Call bells (NIGP 60503)	Select
Desk supplies, Finger stalls (NIGP 47541, 61547)	Select
Desk supplies, Manual letter openers (NIGP 61553)	Select
Desk supplies, Paper cutters (NIGP 60557, 60555)	Select
Desk supplies, Paper punches (NIGP 60567, 60565)	Select
Desk supplies, Pencil sharpeners (NIGP 60560, 60563)	Select
Desk supplies, Scissors (NIGP 60569, 59052)	Select
Desk supplies, Stamps (NIGP 61577)	Select

Cancel

- Field: Name Enter a commodity description OR an NIGP code.
- Click "Search" button. When search results appear, Click "Select" button. If not exact, search additional pages and/or use closest description.

CREATING A REQUISITION (continued)

Add Items” screen re-appears with selected commodity code name in the field.

1 Add Title
2 Add Items
3 Add Accounting Details
4 Checkout

PR1068723: Office Furniture - Lab C
Items: 0 Total: \$0.00000USD

2 Add Non-Catalog Item Requisition

Full Description: Modular work desks

*Commodity Code: Office furniture, Desks (NIGP 42521, 42544)
*Supplier: (No Preference)
*Contact: VIRGINIA CORRECTIONAL ENTERPRISES
Supplier Part Number: JANPAK OF WEST VIRGINIA, INC
Contract #: DGS Department of General Services
Supplier Auxiliary Part ID: Imagistics International, Inc.
Other...

Quantity: 1
Unit of Measure: each
Price: \$0.00000USD
Amount: \$0.00000USD

Update Total

* indicates required field

OK Cancel

- Supplier: The supplier (vendor) search is similar to the commodity code search. The pull-down pick list stores recently used suppliers. To search for other suppliers, click “other”.

Searching for a Supplier

- Field: Company Enter the company legal name (will accept ‘partial’ name)
- Click “Search” button
- Search Results: Choose from names in retrieved search results.
- Click “Select” button

NOTE: Only eVA registered vendors can be retrieved with this search. Use of non-eVA registered vendors is discouraged. If you must use a non-registered vendor, see instructions in the eMail User Guide, Vol. 1.

CREATING A REQUISITION (continued)

The screenshot shows the 'Add Non-Catalog Item' screen in the eVA system. The sidebar on the left indicates the current step is '2 Add Items'. The main form area is titled 'Add Non-Catalog Item' and 'Requisition'. It contains several input fields: 'Full Description' (Modular work desks), '*Commodity Code' (Office furniture, Desks (NIGP 42521, 42544)), '*Supplier' (VIRGINIA CORRECTIONAL ENTERPRISES), '*Contact' (711-001), 'Supplier Part Number', 'Contract #' (74676-03), 'Supplier Auxiliary Part ID', 'Quantity' (10), 'Unit of Measure' (each), 'Price' (\$30.00000US), and 'Amount' (\$300.00000USD). There are 'OK' and 'Cancel' buttons at the top right and bottom right, and an 'Update Total' button. A note at the bottom left states '* indicates required field'.

The “Add Items” screen reappears with selected supplier name and contact data in the fields.

- Supplier Part Number: This field may be used for part number, stock number, catalog number.
- Contract Number: Enter the applicable contract number for the item, if applicable.

Scroll to the right side of the screen and add the following:

- Supplier Auxiliary Part ID: Rarely used – not a required field.
- Quantity: Enter the numeric quantity.
- Unit of Measure: The pull-down list will store recently used units.

To search for other units, choose *other* in the drop down and search as illustrated earlier for the commodity/supplier fields.

- Price: Enter the **UNIT** price. eVA does the math.

Click the “OK” button

CREATING A REQUISITION (continued)

The screenshot displays the eVA Shopping Cart interface. On the left, a sidebar contains a numbered list: 1 Add Title, 2 Add Items (highlighted), 3 Add Accounting Details, and 4 Checkout. The main content area shows a requisition for 'Modular work desks' with a quantity of 10, a unit price of \$30,000.00, and a total amount of \$300,000.00. The supplier is listed as 'VIRGINIA CORRECTIONAL ENTERPRISES'. Below the item details, there are checkboxes for 'Small Business', 'Minority Owned Business', and 'Woman Owned Business'. At the bottom right, a yellow box displays the 'Total Cost: \$300,000.00USD'. Navigation buttons include 'Back to Catalog', 'Next', and 'Checkout'.

No.	Type	SR	Solicit	Description	Qty	Unit	Price	Amount
1				Modular work desks	10	each	\$30,000.00USD	\$300,000.00USD

Supplier: [VIRGINIA CORRECTIONAL ENTERPRISES](#)
Contact: [711-001](#)
Commodity Code: [Office furniture, Desks \(NIGP 42521, 42544\)](#)
Contract Number: 74676-03
Bill To: [SEE COMMENTS](#)
Small Business: ☐
Minority Owned Business: ☐
Woman Owned Business: ☐

Total Cost: \$300,000.00USD

SHOPPING CART

Here's your chance to see what's in your "shopping cart".

If you are ordering more items from the same vendor,

- Enter a checkmark in box next to item number.
- Click the COPY button.
- Enter a checkmark in the box next to the NEW item that appears.
- Click the EDIT button.
- Change the necessary fields for the newly copied item:
description/price/quantity/contract number, etc.
- Click the **OK** button

If you are NOT ordering more items and do not need to edit/add accounting codes, click the **Checkout** button. (Go to page 11)

If you click the **Next** button on the previous screen, you will see the Accounting Line Details screen. Make any necessary changes to your accounting information.

NOTE: If you need to make the SAME changes to MULTIPLE line items, it's recommended that you do a MASS edit from the Checkout screen. (next page)

The screenshot shows the 'Add Accounting Details' screen for a requisition. The left sidebar has a navigation menu with 'Add Accounting Details' highlighted. The main area shows the requisition details and the accounting line item.

No.	Type	SR	Solicit	Description	Qty	Unit	Price	Amount
1				Enter a description for this item.	1	each	\$0.00000USD	\$0.00000USD

Below the table, there are fields for accounting details:

- Fund: 100
- Cost Center/Organization/Speed Code: 200
- Oracle Upgrade: 345
- Code: (no value)
- Program: 444

Buttons at the bottom include 'Edit' and 'Split Accounting'.

Click the **EDIT** button and make changes when fields open up:

The screenshot shows the 'Edit Line Item Accounting' screen for the same requisition. The left sidebar has 'Edit Line Item Accounting' highlighted. The main area shows the accounting line item with dropdown menus for the accounting details.

Line Item	Description
1	Enter a description for this item.

Below the table, there are dropdown menus for accounting details:

- Fund: 100 [select]
- Cost Center/Organization/Speed Code: 200 [select]
- Oracle Upgrade: 345 [select]
- Code: (no value) [select]
- Program: 444

Buttons at the bottom include 'Split Accounting', 'OK', and 'Cancel'.

Click the **OK** button when all fields have been changed.

CHECKOUT

No.	Type	SR	Solicit	Description	Qty	Unit	Price	Amount
<input checked="" type="checkbox"/> 1		<input type="checkbox"/>		CP25WBPLUS, 3-MCP-25WBPLUS, WATER BASED FIRE ...	1	each	\$10.53000USD	\$10.53000USD
Supplier: STATE ELECTRIC SUPPLY COMPANY CP25WBPLUS, 3-MCP-25WBPLUS, WATER BASED FIRE BARRIER CHALK Contact: STATE ELECTRIC- ALL VAPP Orders Commodity Code: Minerals, Chalk (NIGP 57856) Contract Number: 2850004-40VAPP Bill To: SEE COMMENTS Small Business: <input type="checkbox"/> Minority Owned Business: <input type="checkbox"/> Woman Owned Business: <input type="checkbox"/>								
<input checked="" type="checkbox"/> 2		<input type="checkbox"/>		Digital Calculator	1	each	\$20.00000USD	\$20.00000USD
Supplier: Ultrect Digital Calculator Contact: Ultrect Commodity Code: Calculating machines, Calculators (NIGP 600... Contract Number: Bill To: SEE COMMENTS Small Business: <input type="checkbox"/> Minority Owned Business: <input type="checkbox"/> Woman Owned Business: <input type="checkbox"/>								
<input type="button" value="Edit"/> <input type="button" value="Copy"/> <input type="button" value="Delete"/>								Total Cost: \$30.53000USD <input type="button" value="Update Total"/>

Shipping - Entire Requisition
 Ship To:
 Deliver To:
 Need-by Date: ?

Comments - Entire Requisition

FOR MULTIPLE LINE ITEM CHANGES:

If all items need to be changed for things such as accounting codes, check the checkbox above ALL the checkboxes next to items.

If only a few items need to be changed, click the checkbox next to the applicable line item.

Click the **Edit** button below all line items.

On the next screen, enter the changes and click the **Next** button. You will then be shown a new screen with your changes. Click the Done button to proceed to the Checkout screen.

SHIPPING (Checkout Screen)

Shipping information will default to your assigned shipping address. If necessary to change, click the down arrow in the Ship To field and select other. Conduct a search for the applicable shipping address.

Note: Only addresses loaded by the eVA administrator can be seen in eVA.

Shipping - Entire Requisition

Ship To: Procurement, Office of, College of William and Mary

Deliver To: Lynnette Jenkins

Need-by Date: ?

Comments - Entire Requisition

Comments:

☐ include comment/attachment(s) on purchase orders

Add Attachment Delete

- Deliver to: Will default. Can be changed by deleting default and entering new text.
- Need-by Date: Click on calendar. Click on date.

COMMENTS

Comments:

☐ include comment/attachment(s) on purchase orders

☐ mark attachment(s) as Proprietary and Confidential (This checkbox does not apply to approvers)

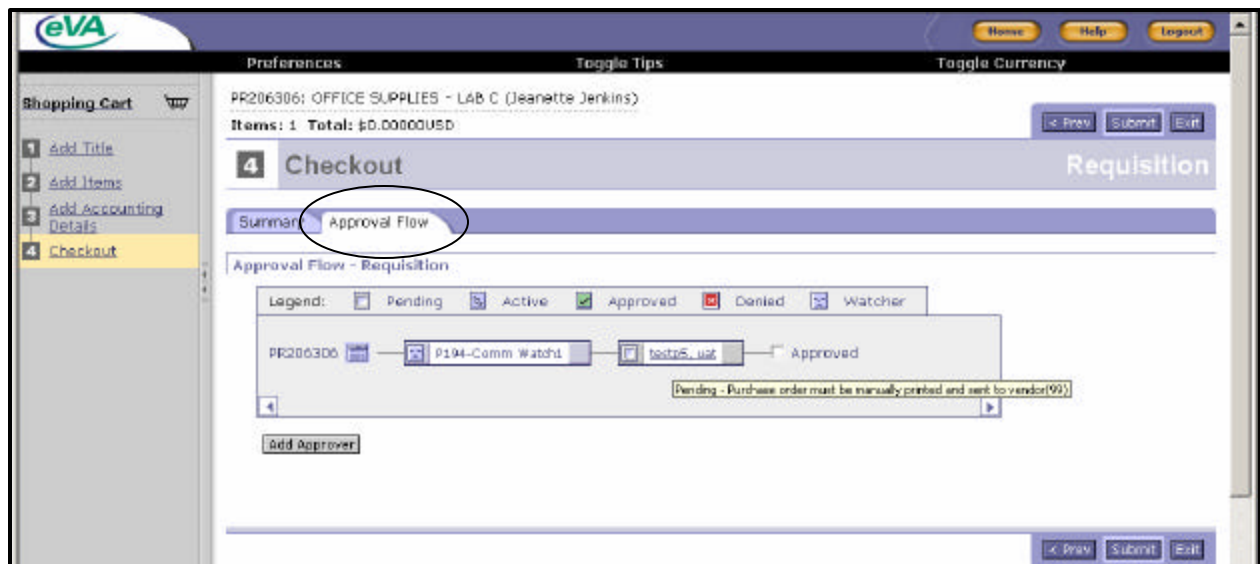
Add Attachment Delete

- Comments: May be added for either the entire requisition or by the line item.
255 character spaces are available for comments.
- Attachments: May be added in the same browsing manner as with e-mail.

IMPORTANT! It's imperative that the "include comment/attachments on purchase orders" checkbox be selected if you desire the vendor see the comments and/or attachments.

APPROVAL FLOW

When you click on the Approval Flow Tab on the Checkout screen, your approval workflow appears so you can see who must approve your requisition. If you click on the approver's box, you will see more detail.



If the vendor cannot accept the order electronically, you will be inserted into the workflow as the LAST approver. This is your cue that the order(s) must be printed and faxed or mailed to the vendor.

ALL DONE?

- Review your requisition and edit, if needed, prior to submitting.
- When satisfied, after review and edits, click "Submit".